



Quick Start Guide to:

Using the Swiftpage Connect Portal

The Swiftpage Connect portal is the one-stop center for accessing all Swiftpage functions. This Quick Start Guide explains all of the buttons you will find on the Swiftpage Connect portal.

The screenshot shows the Swiftpage Connect portal interface. At the top left is the Swiftpage Connect logo. Below it are several functional buttons arranged in two columns:

- 1. Template Editor
- 2. Reports
- 3. Call List
- 4. Drip Marketing
- 5. Leads
- 6. Send Email
- 7. List Manager
- 8. Surveys
- 9. Social Sharing

Below these buttons is a 'Resource center' section (10) containing six orange buttons:

- ▶ Live Demos
- ▶ Feature Tours
- ▶ Consultants
- ▶ Swiftpage Support
- ▶ Deliverability
- ▶ Education Center

On the right side of the portal, there is a 'My Swiftpage' section (11) displaying account information:

- Account Name: rs_121211_spe
- UserID: rs_121211_spe
- Service Level: Team
- Team: Drip Marketing
- Drip Marketing Service Level: Free
- Send Limit: 100

Below this is an 'Account Management' section (12) with three buttons:

- Edit User Profile
- Manage Account
- Upgrade Account

At the bottom right is a 'Support Information' section (15) with the following text:

Monday-Friday, 5:00am - 8:00pm EST
 Phone: 1 (877) 228-8377
 For international customers +1-303-978-1000
 Email: support@swiftpage.com

Swiftpage Functions:

1. The Template Editor button launches the Swiftpage Template Manager. The Template Manager allows you to Edit, Import, or Publish and Distribute Templates. You can also Launch a Template as a landing page.
2. The Reports button displays reports for email blasts and individual sends. You may also view any scheduled sends, request your opt-out list, and generate account-wide reports.
3. The Call List button allows you to generate online Call Lists (ranked lists of your contacts based on how they interacted with your email blast). **Note:** this feature is available only with Pro and Team level accounts.
4. The Drip Marketing button takes you to the Drip Marketing Campaign Manager where you can create and manage your Drip Marketing Campaigns.
5. The Leads button launches the Lead Builder. This feature allows you to locate potential leads based on the specified criteria.
6. The Send Email button opens the Send an Email Blast section. You can elect to send now, schedule a blast for the future, send as another Swiftpage User ID, or send a test email.
7. The List Manager button launches the List Manager database and allows you to import new contacts, manage your existing contacts, and create groups.
8. The Surveys button grants you access to creating new surveys and viewing the results of pre-existing surveys.
9. The Social Sharing button opens the Social Sharing section so that you can create a link between your Swiftpage User ID and Facebook, Twitter, and LinkedIn profiles.

Resource Center

10. The Resource Center window contains links to an assortment of helpful information. You can sign up for a live demo, peruse our list of certified consultants, or access documents to optimize your use of Swiftpage's features.

User Overview

11. The User Overview window displays your Account Name, User ID, Service Level, current Drip Marketing Service Level, and the Send Limit allocated to the current User.

Account Management

12. The Edit User Profile button allows you to change the company information used in [[SpeOwner]] mail merges, the postal address that appears in the footer of each email you send out, your logo, your template distribution list, your user password, and your notification settings.

13. The Manage Account button opens the Account Management menu. The menu provides a number of options such as upgrading your account, reallocating the service, and adding new Users. **Note:** if your user password and your account password are different from one another, you may have to reenter your account password after hitting his button.

14. The Upgrade Account button opens a new window where you can upgrade your Swiftpage account (or purchase it for the first time). **Note:** if your user password and your account password are different from one another, you may have to reenter your account password after hitting his button.

Support Information

15. The Support Information window displays the hours and contact information for Swiftpage's Support department.